



Job Title

Client Success Executive

Reason for Vacancy

New Role

Reporting to:

Jodi Joseph, Divisional Executive, CaseWare Africa

Main purpose of this position



- To build and drive a culture of customer success through the entire customer life-cycle from post-contract throughout the duration of the customers' subscription period; specifically, for the services offered by training, consulting and support teams.
- As the Customer Success Executive, you will develop and implement the strategies required to improve customer retention, identify opportunities for up-selling and cross-selling, and significantly improve the overall net-promoter score amongst our customers.
- Delighting customers so we add more value to them and they refer everyone they know to us

Key Deliverables and Weighting

- Lead the software training, consulting and support senior management team.
- Identify and quantify the key metrics for customer success.
- Leverage the team to act on real-time customer insight.
- Partner with the senior management teams under your leadership to ensure the full utilization and maximization of purchased products, as well as significantly improve the overall customer experience and ultimately the customer success.
- Partner with the senior management team to further develop an online customer community that can serve as an information hub, and a knowledge-sharing space.
- Partner with the senior sales and marketing management team on sales and marketing initiatives, customer events and product and services feedback received through these channels.
- Work with the Head of Product and Product Managers on collated product feedback, to enhance the product road map.

For more information, or if you have any questions, please contact: Candice Clark candice.clark@adaptit.co.za |

Management Level and Details of the Management Component of this role

Direct line management of 2 senior managers, a senior team leader with an indirect team size of 50+.



Technical Knowledge, Skills and Abilities

- Proven ability to conduct in-depth data analysis on customer metrics.
- Previous experience in the development of an online, high-volume, real-time customer dashboard.
- Preferably some domain knowledge that reflects our customer base (audit, accounting, tax, technology).



Behavioural / Soft Competencies, Skills and Abilities

- Influential, self-starter type leader; proven ability to align a senior management team to the vision of the customer success model and drive customer success through a large team.
- Exceptional attention to detail and highly developed critical thinking and reasoning skills.
- Exceptional customer service orientation, with a passionate interest in customer success.
- Well-developed problem identifying and problem solving skills.
- Excellent communication skills (verbal and written).
- Highly innovative, and highly pro-active with a passion for identifying not-seen-before opportunities.
- Organized and systematic, with the ability to dive into the detail and hold the bigger picture in mind simultaneously.



Computer skills And knowledge

- Highly technologically literate, proficient in customizable CRM systems. It is preferable that the successful incumbent has had working exposure to Caseware.

Details of Experience:

- Essential requirements:
- At least 3 - 5 years' experience in a similar Client Success Manager role, within a Saas
 - corporate entity with a large customer base – 4000+ OR a senior management member within an audit practice that has proven interest and experience in the success of the practice's clients.
 - At least 5 years' experience in the leadership of a senior management team.



Education and Qualification

- Essential requirements:
- Completed 3-year tertiary qualification
 - Completed post-graduate qualification (preferably business leadership, finance or similar)
- Desirable requirements:
- CA(SA), MBA

Working Environment & Travel

Fast-paced, high intensity environment. Minimal travel required.

Working Hours

8:00am – 17:00pm. Flexi-time available.

What will make the incumbent successful in this role?

An influential leader with exceptional attention to detail and a hunger to increase our customer's success, innovatively.

Equity Statement?

We are committed to employment equity in our recruitment process. It is our company policy to promote within where ever possible. Therefore priority will be given to our internal applicants if this enables us to achieve our Equity goals.

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